

## WIC Clerk/Technician Observation Tool

<b>Staff:</b>											
<b>Reviewer:</b> 1. 2. 3.	<b>Date:</b> 1. 2. 3.										
<b>Client Category:</b>											
<b>Family Number:</b>											
<b>Client Certification:      #Review if C-Eval observed</b>											
#Welcome, introduction, summary of services?	+	-	NA		+	-	NA		+	-	NA
#Family information & proxy updated?	+	-	NA		+	-	NA		+	-	NA
#Non-English speaker offered translator?	+	-	NA		+	-	NA		+	-	NA
Client agreement read by/to client in their own language?	+	-	NA		+	-	NA		+	-	NA
Client notified of illegality of dual enrollment?	+	-	NA		+	-	NA		+	-	NA
Client given copy of client agreement following review? (Initial Cert)	+	-	NA		+	-	NA		+	-	NA
Client offered copy of client agreement following review? (All other appts.)	+	-	NA		+	-	NA		+	-	NA
<b>Adjunct Eligibility data collection</b>											
Authorized person asked about MA/HK, food stamps, FIP?	+	-	NA		+	-	NA		+	-	NA
• If yes, verified?	+	-	NA		+	-	NA		+	-	NA
Family size reviewed?	+	-	NA		+	-	NA		+	-	NA
Income documentation reviewed? (verbal- adjunct, migrant, homeless)	+	-	NA		+	-	NA		+	-	NA
Language, Residency and identity verified/confirmed? (Authorized person and clients?) ID-NEW ONLY	+	-	NA		+	-	NA		+	-	NA
Migrant/homeless receive special income/residency/termination policies?	+	-	NA		+	-	NA		+	-	NA
• "No proof" attestation form used appropriately?	+	-	NA		+	-	NA		+	-	NA
Short cert process used appropriately? (Income 30 days, Residency & ID, proof of Pregnancy 60 days)	+	-	NA		+	-	NA		+	-	NA
USER ID in status bar matches staff person?	+	-	NA		+	-	NA		+	-	NA
<b>Voter Registration:      #C-Eval, if address change only</b>											
Offered using MI-WIC script?	+	-	NA		+	-	NA		+	-	NA
Declination form signed if not registering or not eligible to register?	+	-	NA		+	-	NA		+	-	NA
<b>Race/Ethnicity</b>											
Are all clients asked using the MI-WIC script to identify their own race/ethnicity?	+	-	NA		+	-	NA		+	-	NA
Staff record race/ethnicity observations if client declines?	+	-	NA		+	-	NA		+	-	NA
<b>Physical Presence:</b>											
Is the applicant present or not present for allowable reason and documented?	+	-	NA		+	-	NA		+	-	NA
Are infants under 8 wks allowed to be enrolled with hospital data?	+	-	NA		+	-	NA		+	-	NA
<b>Notes:</b>											

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<b>#Length (0 – 24 months):</b>											
One person holding head while other holds both knees down and pushes heels against footboard?	+	-	NA		+	-	NA		+	-	NA
Repeated until confirmed?	+	-	NA		+	-	NA		+	-	NA
Recorded immediately?	+	-	NA		+	-	NA		+	-	NA
<b>#Weight (0 – 24 months)</b>											
Scale zero-balanced prior to weighing w/Diaper and Sheet?	+	-	NA		+	-	NA		+	-	NA
Weighed with dry diaper and t-shirt only?	+	-	NA		+	-	NA		+	-	NA
Repeated (& zero-balanced if digital) until confirmed?	+	-	NA		+	-	NA		+	-	NA
Recorded immediately?	+	-	NA		+	-	NA		+	-	NA
<b>#Head Circumference (0-24 months):</b>											
Measurement taken with tape above eyebrows?	+	-	NA		+	-	NA		+	-	NA
Repeated until confirmed?	+	-	NA		+	-	NA		+	-	NA
Recorded immediately?	+	-	NA		+	-	NA		+	-	NA
<b>#Height/Weight (&gt;24 months or woman):</b>											
Ht & Wt - No shoes?	+	-	NA		+	-	NA		+	-	NA
Ht - Heels, butt, and shoulders against wall and legs straight?	+	-	NA		+	-	NA		+	-	NA
Ht - Eyes straight ahead?	+	-	NA		+	-	NA		+	-	NA
Wt – scale zero-balanced prior to weighing?	+	-	NA		+	-	NA		+	-	NA
Repeated until confirmed?	+	-	NA		+	-	NA		+	-	NA
Recorded immediately?	+	-	NA		+	-	NA		+	-	NA
<b>#Measurement not taken or not taken according to Policy:</b>											
• Cannot be taken, is “unk” v’d & reason noted?	+	-	NA		+	-	NA		+	-	NA
• Not according to policy is “?” v’d & reason noted?	+	-	NA		+	-	NA		+	-	NA
<b>#Lab: (Policy 2.</b>											
Immunization assessed/referral if not up to date?	+	-	NA		+	-	NA		+	-	NA
Lead screening assessed? (refer if not screened )	+	-	NA		+	-	NA		+	-	NA
Does staff wash hands before gloving (sanitize allowed)	+	-	NA		+	-	NA		+	-	NA
Is client/AP asked about bleeding problems or latex allergy?	+	-	NA		+	-	NA		+	-	NA
Does Tech wear gloves?	+	-	NA		+	-	NA		+	-	NA
Is client’s skin cleaned well before poke?	+	-	NA		+	-	NA		+	-	NA
Are first TWO drops of blood wiped away?	+	-	NA		+	-	NA		+	-	NA
Is blood collected w/o “milking”?	+	-	NA		+	-	NA		+	-	NA
Is danger of band-aid/choking addressed?	+	-	NA		+	-	NA		+	-	NA
Blood results documented in MIWIC and log?	+	-	NA		+	-	NA		+	-	NA
If meets guidelines, is retest performed?	+	-	NA		+	-	NA		+	-	NA
If referral data used - correct time frame?	+	-	NA		+	-	NA		+	-	NA
Recorded immediately?	+	-	NA		+	-	NA		+	-	NA
Does staff wash hands after gloving (sanitize allowed)	+	-	NA		+	-	NA		+	-	NA
Does staff thank client & tell them next step w/ CPA?	+	-	NA		+	-	NA		+	-	NA
<b>2 things I learned from this observation:</b>	1.					2.					
	1.					2.					
	1.					2.					
<b>2 suggestions for improvement:</b>	1.					2.					
	1.					2.					
	1.					2.					

Thanks to Monroe County WIC!